

| Find Records Fast | |
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| Using Filters | On any list view, in the Task Pane, in the Filters section, expand the filters and select the check boxes for the information you want to see in your group. |
| Using Lookups | Click the Q (Lookup) tab in a list or detail view, or right-click an item in the Navigation Bar and select the Lookup option (not available for all views). |
| Using SpeedSearch | Click the Q (SpeedSearch) button in the toolbar. You can: <ul style="list-style-type: none"> Match on all words any words the exact phrase Use natural language Search on the root by thesaurus on sound like Use Boolean search criteria |
| Seeing a list of recently-viewed items | On the tool bar, click Recently Viewed and select an item from the list. |

| Work the Way I Want To | |
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| Using groups | Create groups for records you want to track. |
| Accessing your groups | On a list or detail view click a group tab, or in the title bar click Groups . |
| Selecting records to create a group | <ol style="list-style-type: none"> From a list view, select one or more records. To select more than one record, hold down [Ctrl] as you click each item. In the Task Pane, under Common Tasks, click Save Records as Group. Use Query Builder to define group properties, layout, sorting, or defaults. Click OK. |
| Sharing your group with other users | <ol style="list-style-type: none"> Open the list view containing the group you want to share. Right-click the group tab, and then select Share. In the Share Group dialog box, click Add. Click the Users, Departments, or Teams tab, select who you want to share your group with, and click OK. Click OK. |
| Setting user options | <ul style="list-style-type: none"> On the Tools menu, click Options, and use each tab to set specific options. |



Infor CRM v8.2

Quick Reference Card

for the Web User

| Commonly Used Icons | | | | | |
|---|--|--|--|---------------|--|
| Working with Records | | | | | |
| Find | | Refresh | | Add | |
| Calendar | | Email | | Associate | |
| Save | | Web | | Delete/Remove | |
| Reset | | View Address | | Edit | |
| Moving Around | | | | | |
| First | | Next | | | |
| Previous | | Last | | | |
| Communicate Effectively | | | | | |
| Sending an e-mail | | On the Write menu click E-mail or click next to an e-mail address in a detail view. | | | |
| Creating form letters, e-mail, and faxes | | <ol style="list-style-type: none"> On the Write menu, click Mail Merge. Use the Merge and History tabs to select a template, records to include, the type of output to create (e-mail, fax, file, or printer), and history options. Click Merge. | | | |

| Get My Tasks Done | |
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| Receiving alerts | See Alerts and Past Due notifications in the menu bar. |
| Viewing my activities | Use the Activities List view to manage your scheduled activities and events by type. Select the time frame for the displayed items. On the Navigation Bar , click Activities . |
| Using my calendar | Manage your time and keep track of scheduled activities and events. View your schedule by the day, week, month, or year. You may also be able to view other users' activities and events. <ul style="list-style-type: none"> On the Navigation Bar, click Calendar. |
| Scheduling a call, meeting, or to-do | On the Schedule menu, click the activity to add. |
| Inviting other users | Use the Availability tab to invite other Infor CRM users to a phone call or meeting. |
| Completing an activity | Do one of the following: <ul style="list-style-type: none"> Open the activity and click Complete. On the Schedule menu, click Complete Activity. |
| Adding records | On the New menu, select record to add. |
| Checking on notes and history | Open a record's detail view and click the Notes/History tab. Use the filters to narrow the list. |
| Using the Dashboard | Display and interact with a variety of performance and analysis tools in a dashboard format. <ul style="list-style-type: none"> On the Navigation Bar, click Welcome. |
| Using the Desktop Integration Module | <ul style="list-style-type: none"> To install, on the login page click Install Enhancements. Features include: <ul style="list-style-type: none"> Microsoft Outlook Integration Drag and drop – files and Microsoft Outlook e-mails Outlook Sync Mail Merge |
| Get Help | |
| Finding scenarios | On the menu bar, click ? , and then click Getting Started Guide . |
| Opening online Help | <ul style="list-style-type: none"> Click ? (Help) to open the help system. |

| Meet My Goals | |
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| Adding and qualifying leads | Do one of the following: <ul style="list-style-type: none"> To add a single lead, on the New menu, click Lead. To import a list of leads, on the Tools menu, click Import Leads. Use the lead qualification check boxes on the Lead Detail view to validate information and determine if the lead is ready to be converted to a contact and account. To convert a qualified lead, click Convert Qualified Lead . |
| Creating and launching campaigns | To create a campaign, on the New menu, click Campaign . Select targets, define stages and tasks, and add products to a campaign. When the campaign is ready, click Launch . Use the stages and tasks and target responses to monitor the campaign's progress and success. |
| Pursuing opportunities | On the New menu, click Opportunity . Use sales processes to manage your sales pipeline. When an opportunity is won or lost, change the Status to Closed-Won or Closed-Lost and enter reasons for closing the opportunity. |
| Making sales orders | On the New menu, click Sales Order . Use sales orders to track products purchased by an account. |
| Adding and processing tickets and defects | On the New menu, click Ticket or Defect . The Area, Category, and Issue boxes determine who it will be assigned to. Use the Punch In/ Punch Out button to log time against a ticket as you are working on it. When processing is complete, change the Status to Closed . |
| Enabling returns | Create authorization for a customer to return a product. On the New menu, click Return . A return must be associated with a ticket. Use the Return Detail view to add product and shipping information. After the return is complete, change the Status to Closed . |
| Creating and assigning contracts | On the New menu, click Contract . Contracts may be based on days, hours, incidents or monetary value, or may be perpetual. In the account's detail view, click the Contracts tab to see if a contract exists, and the type of contract. |